



ARIZONA

ARIZONA OFFICE OF TOURISM
BRAZILIAN MARKET – STRATEGIC PLAN
2013-14

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BRAZILIAN ECONOMY IN BRIEF

Brazil is the largest economy in Latin America and the 2nd largest in the Americas, behind only the United States. Nowadays, the country is the world's seventh largest economy.

Brazil has 192 million inhabitants – the world's 5th largest population. It is the largest and the most populous country in Latin America and plays a central role in the economy of the region.

The country is experiencing its biggest economic prosperity outburst in decades and the emergence of a new middle class, with the inclusion of 35 million additional people.

Regarding the overall economy, despite modest growth in GDP of 0.9% in 2012 (Source: IMF), the expectations of financial analysts are better for the year 2013. According to the Central Bank, it is estimated the economy will grow about 3%, therefore, a more positive result. For 2014, the expectations of financial market analysts for economic growth remain stable at 3.50%.

Brazil in the World

- 7th largest economy
- 5th highest population
- 2nd biggest food producer, only behind the USA
- 2nd biggest executive jets producer
- 1st producer of coffee, orange juice, beef and sugar
- 3rd biggest organic food producer
- 3rd biggest consumer market of toiletries and cosmetics
- 4th biggest consumer of cars
- 4th biggest consumer of video games
- 6th biggest consumer of petrol
- 3rd biggest shoe manufacturer
- 4th biggest provider of tourists to the USA

Regarding tourism, the Brazilians broke the record for spending abroad in 2012 when, according to a survey released by the Central Bank, tourist spending reached US\$ 22.2 billion – the highest since 1947 when the Bank began keeping records. Despite that the dollar was much more expensive in 2012, spending abroad increased 4.6% in 2012 over 2011. According to the Central Bank, Brazilians now have more money in their pockets due to higher incomes. Therefore the tourist will continue to travel, despite the weakening real, to take advantage of lower prices in other countries.

Currency Exchange:

US Dollar:

Date	Buying Rate	Selling Rate
05/09/2012	1,9571	1,9577

Date	Buying Rate	Selling Rate
05/09/2013	2,0046	2,0051

Source: Central Bank



Currency Exchange variation between May/09/2012 – May/09/2013

According to a survey conducted by the Ministry of Tourism in partnership with Getúlio Vargas Foundation, taking in consideration only the potential tourists for 2013, 48% of them will prefer to travel inside Brazil, 21% abroad and 31% are indecisive. *The president of the Brazilian Tourism Institute (Embratur) says a significant share of Brazilian tourists still prefer to travel abroad because it is cheaper than some of the destinations in the country.*

PERSPECTIVES

The International Monetary Fund expects that Brazil will become, in a short time, the world's fifth biggest economy, ahead of France and UK. Research by McKinsey also points out that Brazil will have the world's fifth biggest consumer market in 2020, behind the USA, China, Japan and Germany.

The country has also been through an agitated period concerning investment, infrastructure and job creation due to the fact that the country will host, in 2014 and 2016, the world's two biggest sports events – FIFA World Cup and the Olympic Games, respectively.

BRAZIL IN SOUTH AMERICA

Brazil has been leading the economy and growth in South America, including the travel and tourism sector. Considering Brazilian tourists, the country leads the number of travelers sent to the USA and Europe annually. Brazil is the only South American country in which Portuguese is spoken. Its area and population corresponds to the sum of areas and population of all the countries of the region.

Brazil in South America

- 1st biggest economy of the region
- 2nd biggest crude oil reserves and one of the world's petrol producers which most increased its production over the past years
- 1st producer of steel
- 1st place among the countries which most receive international events and the 2nd on the American continents (only behind the USA)
- 1st market issuer of tourists to the USA
- 1st place among the stock markets in South America, with Bovespa
- 1st and 2nd largest shopping malls in Latin America

BRAZIL MAIN MARKETS

The state of Sao Paulo is the richest in Brazil. There, the biggest metropolis in Latin America is located: the city of Sao Paulo. Alone, Sao Paulo's GDP corresponds to 1.7 times the entire GDP of Argentina, 2.2 times Colombia's GDP and 3.0 times Chile's GDP.

Sao Paulo city is home to:

- 38% of the 100 largest privately-owned companies with national capital
- 63% of the international groups that entered the Brazilian market
- 17 of the 20 largest banks
- 31 of the 50 largest insurers
- Approximately 100 of the 200 technology companies
- Bovespa – the largest stock exchange in South America
- Hospital das Clinicas, the largest and most renowned hospital complex in Latin America
- Centro Comercial Aricanduva, the largest mall in Latin America with 500 stores
- 6 of 7 of the most popular internet portals
- The largest GLBT Pride Parade in the world
- The Sao Silvestre Race, which attracts on average 15,000 runners from around the world from about 20 countries.

Other major markets in Brazil include Rio de Janeiro, Minas Gerais, Rio Grande do Sul, Paraná, Bahia, Pernambuco and Distrito Federal.

INTERESTING FACTS OF THE BRAZILIAN MARKET

Purchasing power and the new middle class

In the last decade, 35 million people were incorporated into the middle class in Brazil. According to a study conducted by the Strategic Affairs Secretariat (SAE) of the government, it is estimated that Brazil has 104 million people in the middle class representing 53% of the Brazilian population. Meanwhile 20% of the population is considered upper class. This transformation has been changing people's lives not only relative to the economic scenario but also in terms of values and attitudes, such as consumption habits at home and during travels.

Luxury Market

For the first time, Brazil emerges as having potential in the luxury market. National brands have been investing in physical stores in-country with an eye on economic growth. An example of this is the newly-opened Shopping JK Iguatemi, in Sao Paulo, with brand stores such as Prada, Carolina Herrera, Chanel, Calvin Klein, Dolce & Gabbana, and Gucci. Nowadays, Brazil has 50 billionaires and around 230,000 millionaires. This increase in income has been moving the luxury market. The forecast, according to Bain & Company, is that the Brazilian luxury market will increase up to 25% in five years. According to Credit Suisse, Brazil will gain 270,000 new millionaires in the next five years.

Connected People

Brazil is the second biggest market concerning Facebook users, with 35% of the population connected to the social network. It also occupies the second position considering Twitter, a fact that has been stimulating businesses to invest in e-commerce. Around 42 million people claim to have bought online, while a computer is sold every second in the country. According to research conducted by Fundação Getulio Vargas, the country already has more cell phone lines than inhabitants and 36% are smart phones.

THE TOURISM MARKET IN BRAZIL

In 2012, for the first time, the number of travelers in Brazil surpassed the mark of 100 million people. According to ANAC's numbers, 101.4 million Brazilians traveled by plane in the country or from it, an increase of 9.4% compared to 2011.

According to the Latin America Association of Corporate Travel and Event Managers (ALAGEV), the travel and tourism segment increased 12.88%, reaching R\$32.3 billion. If we consider the growth from 2006, when the Economic Indicators of Corporate Travels (IEVC) started to be measured, the sector growth reaches 80.17%.

- Total of Brazilians traveling by plane in 2012: 101,354,228
- Airlines operating in the country: 9 national, 39 international
- Number of travel agencies/operators: 13,203
- Corporate Travel: R\$32.3 billion in movement / increase of 12.88% in a year

BRAZILIANS IN INTERNATIONAL TRAVELS

Brazilians continue to be the main clients of the nine national and 39 international airlines which operate in Brazil. The number of departures and arrivals in the Brazilian airports increased 7.3% between 2011 and 2012 with domestic numbers increasing 7.7%, while international numbers increased 4%.

The majority of international flights leaving or coming to Brazil are from Latin America. Considering the total of 1,131 weekly flights to and from the country in April 2013, 581 or 40.35% of the total had origin/destination in Latin America, according to a survey conducted by Panrotas.

Although, the percentage of flights to North America, mainly to the USA, continues to grow, last year they represented 24% of the total in the country and, this year, have reached 26.5%.

International Flights to/from Brazil (weekly – April 2013)

Region	Flights	Seats
Latin America	581	95,491
Europe	234	63,671
North America	262	62,748
Africa	22	5,537
Asia	32	9,238
Total**	1,131	236,685

**Accounted only non-stop flights. Other frequencies are not accounted in order to avoid duplicity in the number of total flights.

BRAZILIANS IN THE UNITED STATES

Brazil is the fourth largest provider of tourists to United States, not including the border countries. In 2012, Brazilian arrivals to the US reached 1.79 million, an increase around 19% over 2011.

According to estimates from the United States Department of Commerce, in 2013 Brazil will exceed Germany and take over the position of the third biggest overseas market to the United States. Projections by the Office of Travel and Tourism Industries (OTTI) show that, in 2013, 2,029,000 Brazilians will visit the United States versus 2,011,000 Germans with annual growth of Brazilians tourists at 14% versus 4% for Germans. It is worth mentioning that among the top 10 markets, Brazil had the second highest growth, behind only China.

Some interesting facts:

In 2013, over 900,000 Brazilians may visit New York, according to estimates from NYC & Company. Very soon Brazilians may overtake the UK as the country which sends the most tourists to the destination.

Regarding spending, Brazil has already conquered the position of the third biggest market to the United States, excluding the border countries, with US\$9.8 billion in spending in 2012, an increase of 19.7% compared to 2011.

The most visited cities by Brazilian tourists in the United States are New York, Orlando, Miami, Las Vegas, and Los Angeles/San Francisco. There are seven North American states (including Arizona) and 10 American cities with representation in Brazil.

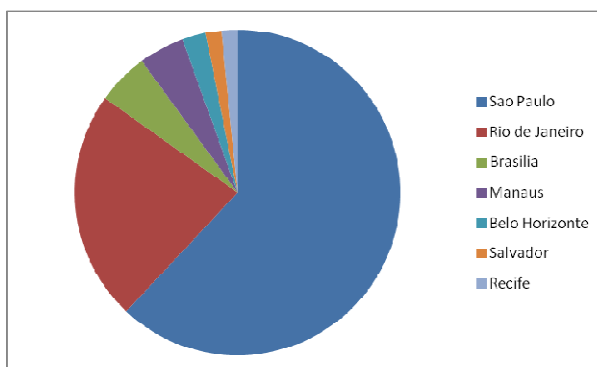
How do the United States and Brazil connect?

Nowadays, there are 240 weekly flights between the United States and Brazil, connecting 11 American cities and seven Brazilian markets, and, by the end of this year, this number will be even higher. In December 2013 American Airlines will offer additional flights that will connect the cities of Porto Alegre and Curitiba in the south of Brazil to Miami. In addition, AA will also connect Brazil (Sao Paulo) to Los Angeles in the fall of 2013 and Chicago in 2014.

Delta Airlines has also requested second daily flights between Sao Paulo and Atlanta and Sao Paulo and New York, hopefully launching in 2013. And there is more! In July 2013, Copa Airlines, from Panama (with great setup in Brazil – flying from all the major cities in the country), began flights to eight destinations in the United States.

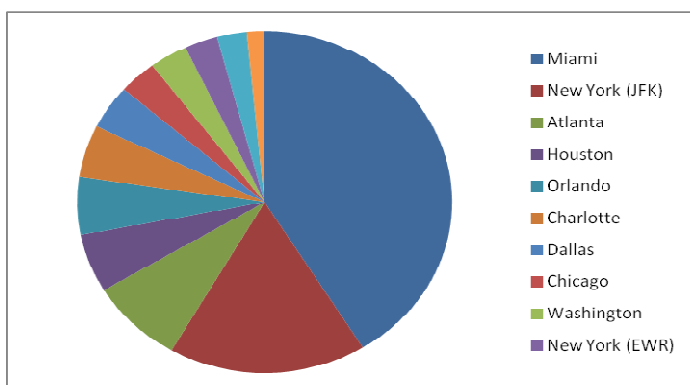
Market Share (seats) - Brazilian Cities

Sao Paulo – 61.99 %
 Rio de Janeiro – 22.86%
 Brasilia – 5.13%
 Manaus – 4.52%
 Belo Horizonte – 2.34%
 Salvador – 1.58%
 Recife – 1.58%



Market Share (seats) – USA Cities

Miami – 41.23%
 New York (JFK) – 17.04%
 Atlanta – 8.11%
 Houston – 5.55%
 Orlando – 5.43%
 Charlotte – 4.97%
 Dallas – 4.18%
 Chicago – 3.28%
 Washington – 3.28%
 New York (EWR) – 2.86%
 Detroit – 2.56%
 Los Angeles – 1.52%



Source of information for all the information above: Brazilian Overview 2013 – Panrotas Newspaper.

ARIZONA OFFICE OF TOURISM STRATEGY FOR BRAZIL

When a great tourism destination like Arizona meets one of the world's fastest growing economies such as Brazil, opportunities are generated like never before.

As we all know, the Brazilian market still represents a small piece of the pie for Arizona, the Arizona Office of Tourism (AOT) and our statewide partners. The budget for promotion, marketing, and sales activities in this market is very conservative BUT our presence, networking, and relationship building with the Brazilian tourism professionals (trade and media) will be very aggressive and effective.

GOALS TO BE ACHIEVED IN THE FIRST YEAR

- Establish Arizona as a destination of choice in Brazil
 - o Increase knowledge and interest in Arizona (people do not go because they do not know)
 - o Develop content and promotional materials in Portuguese
- Create and strengthen relationships with the travel trade
 - o Increase number of Tour Operators selling and promoting Arizona itineraries (Min 15)
 - o Increase number of Travel Agent specialists (Min 50)
- Create and strengthen relationship with the media
 - o Increase number of articles published on Arizona (Min 10)
 - o Increase Arizona's content in the online world – portals, blogs, etc (Min 10)

STRATEGIC FOCUS

Starting with an investment from the State of Arizona, and through a lot of passion, professionalism, creativity and involvement from Global Vision Access (GVA) and AOT, we will be able to establish, in a very structured and efficient way, Arizona as a tourism destination of choice in Brazil. GVA's suggestion for Arizona's approach in the Brazilian market is "THE BEST OF ARIZONA! IT'S BEAUTIFUL, DIVERSE, AND ACCESSIBLE"! This is not a slogan – it is the concept we will follow. The slogan continues to be "The Grand Canyon State" as used by AOT. We will take advantage of the fact that many Brazilians are familiar with the Grand Canyon and use this amazing Arizona icon as a reference in our promotional actions.

AOT's marketing, advertising, and public relations approach in Brazil will focus on assertively promoting the major tourism experiences Arizona has to offer. The priority areas of focus are listed below:

Iconic, Signature Scenery – including places like Grand Canyon, Monument Valley, Lake Powell, Antelope Canyon, Sedona and Saguaro National Park.

Outdoor Adventure – Arizona's beautiful scenery and protected lands encourage the visitor to get out and explore. Arizona has everything from traditional hiking, biking and canyoneering to water sports including rafting, kayaking, house-boating, and swimming to winter sports such as cross country and downhill skiing.

Year Round Destination – Arizona is an all-season destination due to its amazing diversity. No matter what time of year, visitors can find pleasant warm weather in some part of the State, yet it also has four seasons in the north.

Luxury Product – Arizona offers world class resorts, spa and golf available throughout the State, but primarily focused in Scottsdale, Phoenix, Sedona and Tucson.

Western Lifestyle and Culture – Arizona’s western history has been immortalized in the movies. Today it includes everything from rodeos and dude ranches to half-day horseback rides and Cowboy College, where students learn to be a “real” cowboy.

American Indian History and Culture – with 22 tribes, Arizona has more tribes and more tribal lands than any other state. Some of our historical sites include Navajo National Monument, Montezuma Castle and Tuzigoot National Monument along with scenic (and sometimes sacred) spots such as Monument Valley, Antelope Canyon and Canyon de Chelly. There are many cultural spots including Mission San Xavier del Bac, the Heard Museum, the Museum of Northern Arizona and Explore Navajo.

Secondary areas of focus include:

Astronomy – Arizona has many telescopes, especially in the southern part of the State, International Dark Cities (Flagstaff is the first), amateur astronomers leading programs at resorts and even production of telescope components.

Culinary – With food and wine marking a growing trend around the world, Arizona offers everything from regional cuisine, James Beard award winning chefs, rapidly expanding craft beer production and a burgeoning wine industry including two recent 90 point awards in Spectator Magazine.

Scenic Roads and Driving Tours – Our iconic scenery provides visitors with a wide variety of road trip options such as Route 66, Apache Trail and Oak Creek and Mt. Lemmon Scenic Byways.

Art and Architecture – Arizona’s reputation as a destination for art and architecture is well established and includes everything from galleries and art walks to thriving local artist communities in places like Bisbee and Jerome as well as American Indian art highlighting ceramic pots, hand-woven rugs and silver jewelry. Renowned architects including Frank Lloyd Wright, Paolo Soleri, and Mary Colter have lived and worked in the State.

Weddings and Honeymoons – everything from destination weddings to romantic honeymoons

Festivals and Events – many and varied throughout the year and throughout the State

Parks and Monuments – Beyond the best known parks, the State has many lesser known, but equally fantastic parks and monuments such as Chiricahua National Monument, Kartchner Caverns State Park,

Superstition Wilderness Area, Tonto Natural Bridge State Park, South Mountain Park, McDowell Sonoran Preserve.

Water Activities – Typically associated with gorgeous desert scenery, Arizona also offers a wide variety of water sports including rafting, kayaking, speed boats, jet skis, house boats, water skiing, swimming and boat tours.

Professional Sports and spectator sports – football, basketball, baseball, hockey, spring training (baseball), golf tournaments, etc.

PARTNERS

For each segment mentioned above, GVA will work with the major tour operators, travel agents, and media professionals in Brazil to ensure a substantial increase in understanding and interest in selling and promoting Arizona. We will provide them with all of the support and necessary training to boost sales opportunities and maximize coverage on the destination. A strong focus will be placed on drastically increasing the number of Arizona specialists from Brazil, which will consequently increase the number of Brazilian arrivals to the destination.

We will also develop partnerships with tourism and non-tourism related associations (i.e.: BRAZTOA, ABAV, VIRTUOSO, Brazilian Golf Association, and others) since we believe the best way to guarantee success in any activity is to work with very affluent and influential players from each potential niche market.

TARGET DEMOGRAPHICS

Brazilians are very inquisitive and interested in the world – especially in the USA. This combined with the strength of the Brazilian economy and increased disposable income for the upper and middle classes create huge potential for Arizona.

The middle class in Brazil has grown nearly 50% over the past ten years and is now estimated to total 104 million people according to the Strategic Affairs Secretariat (SAE) of the government. More importantly, the upper class also grew during the past few years and will continue to grow as previously mentioned in this document. Which means Arizona should take advantage of this fact and target the very qualified travelers.

Adventurous and very affluent consumers will be our primary target.

- Our main target will be men and women between 25-50 years old;
- Their main motivation for travelling is to explore new territories; nature, culture, local life, food and traditions. They also want to broaden their horizons and return home feeling rejuvenated.
- They tend to have higher education, are seasoned travelers, technology savvy and travel without children
- They are world travelers and explorers, passionate for nature and outdoor activities
- Their annual income varies between R\$120.000,00 – R\$360.000,00 (\$60,000.00 - \$180,000.00)
- And they are mostly from the Southeast and South region of Brazil (mainly Sao Paulo State)

The final consumers will be targeted indirectly. They will be reached mainly by the selected tour operators and travel agents we will work with in this market; through their promotional activities and sales force campaigns. Consumers will also be reached through our online presence and articles that will come out on the destination from all the PR and Communication work we will do in this market.

CONTENT/INFORMATION STRUCTURE

○ Promotional Materials

GVA will develop several promotional materials and presentations on Arizona including a general brochure and several electronic brochures on different niches. We will also prepare several training presentations for the trade (tour operators and travel agents). Having promotional materials and content in Portuguese is of huge importance in this market.

○ Arizona Website

We will create the website “VisiteArizona.com”. It will be the key communication platform for Arizona in Brazil. It will target consumers, trade and media professionals from these markets. It will be the main interface and liaison for our social media activities, news updates, etc.

Portuguese Website Structure: (It will have a lot of links to the main site for more reference)

Home – Grand Canyon – Where to Go – What to do – Plan your Trip – News – Video/Photo Gallery – Contact

- *Where to Go*
(Northern /West Coast / North Central / Central / Southern)
- *What to do*
(Eco-Adventure, Sports, Wellness/Luxury, History/Culture, Romance, On the Road, Family Activities Dining and Nightlife)
- *Plan Your Trip*
- *News*
- *Contact*
- *Social Media Links*
- *Media Pages*
- *Trade Pages*

○ Arizona Social Media

As mentioned before, Brazilians are very well connected and use social media channels as an efficient form of communication with effective content. Brazil is the second biggest market for Facebook users, with 35% of the population connected to the social network, and second for Twitter, stimulating businesses to invest in e-commerce.

We will develop Arizona’s online presence in Brazil as one of the best and most diverse destinations in the World. We will use this communication channel to effectively promote Arizona’s products/ niche markets.

This online presence will be built upon a social ecosystem; a connected group of social networks with rich content and opportunities to expand relationships through popular blogs, YouTube, Facebook, Twitter, Flickr, etc.

The online strategy, especially in the beginning, is to create new, updated, and amazing content on Arizona and its tourism attractions so we will rapidly increase our number of likes/fans.

TRADE OVERALL APPROACH

We will start and strengthen partnerships with selected tour operators and travel agents, specific associations and entities related to all suggested segments mentioned above. We will work closely with them to develop products to Arizona that best fit their clients' needs and expectations.

○ Sales Calls

GVA/AOT will have weekly sales calls/visits to major tour operators in order to develop and nourish a close relationship with them. We will make sure they are all well informed about the destination and have adequate itineraries available for their clients (agents and final consumers)

○ Training Seminars

GVA/AOT will educate the Brazilian trade on Arizona, its destinations and niche activities. We will organize and participate in travel agent and wholesaler training events. We will also have several training seminars for selected trade professionals in our office.

○ Suggested trade shows

GVA agrees that travel and trade shows are usually very costly and do not really provide AOT and partners with the best ROI. However, this disappointment usually happens when too much money is allocated and spent on such events. We believe that if we participate in a small format we will still secure exposure on Arizona during the events in addition to be able to take full advantage of all the networking and business opportunities available.

- Sept 4-8, 2013 – Feira das Americas

It is a great opportunity to network, get acquainted and do business with the tourist trade of the Americas, in Brazil's largest outbound market – Sao Paulo. In 2013, for two additional days, the fair doors are opened to end consumers. A market leader, the fair's 41st edition is organized by ABAV – Brazilian Travel Agencies Association, and BRAZTOA – Brazilian Tour Operators Association. Arizona should be present, even if with a small booth, to secure better exposure among the Brazilian trade professionals

- Nov 7-10, 2013 - Feira de Turismo de Gramado

It is a very professional tourism event in the south region of Brazil. It is without a doubt the best opportunity to network with major tour operators, travel agents and media professional from this very affluent market. We strongly advise Arizona to be present, even if with a small booth, to secure better exposure among the Brazilian trade professionals from this very important market.

- April 5 -9, 2014 – IPW 2014 Chicago.

U.S. Travel's IPW 2014 will be held Saturday, April 5, through Wednesday, April 9, at McCormick Place in Chicago, Illinois. IPW will have more than 1,100 exhibitor booths held by U.S. Suppliers of USA travel products and destinations and more than 5,000 attendees who are international travel buyers, domestic travel buyers and international journalists representing more than 70 countries.

- April 23-25, 2014 - World Travel Market - Latin America. (Still TBD)

It will be the second edition in Brazil and it will once again be in partnership with Braztoa - Braztoa/ SP – a very well known and respected association in Brazil. Arizona should be present, even if with a small booth, to secure better exposure among the Brazilian trade professionals. It is a great opportunity to network with most of the travel and tourism professionals from all over Brazil

○ Sales missions

GVA plans to facilitate and organize one sales mission on behalf of Arizona and its local partners in Brazil during the 2014 fiscal year. We suggest a Mission in Sao Paulo in February 2014. We suggest the following format for the February mission:

1. Trade – all day meetings with TOP tour operators and selected agents, and a cocktail reception/dinner with major tourism players (tourism association, special partners, and network with companies for potential future projects).
2. Press – morning press conference with all Brazilian trade publications and afternoon meetings with TOP consumer media publications. Media team will also attend the cocktail reception/dinner with major tourism players (tourism association, special partners, and network with companies for potential future projects).

○ Inspection trips

GVA/AOT will organize two inspection trips for tour operators and selected travel agents (October 2013 & March 2014). We suggest focusing the first trip on general operators and the second trip on luxury operators. It would be ideal to have around 5-8 TOs in each trip. GVA will negotiate seats with possible airlines partners in order to minimize cost for this activity and increase exposure and ROI.

○ Co-op activities

GVA will develop a trade co-op advertising campaign using the most effective media channels in partnership with selected airlines and top tour operators in order to maximize budget and ROI from this activity. GVA/AOT will select a total of 3 - 5 partners (TOs and selected travel agents) and develop with each of them customized advertising campaigns to boost their sales of Arizona packages.

The budget will be divided between partners and will cover all channels (online, print, etc). Detailed information and budget breakdown for each campaign will be sent to AOT for final review and approval before each launch!

○ Incentive Campaigns

GVA will develop incentive campaigns with selected tour operators to increase consumer and trade awareness and interest in Arizona. Throughout the year, GVA/AOT will select a total of 3 - 5 partners (TOs and selected travel agents) and develop with each of them customized incentive campaigns to boost their sales of Arizona packages.

The budget will be divided between partners and will cover the campaign's production cost and prizes. Detailed information and budget breakdown for each campaign will be sent to AOT for final approval before each launch!

○ Special Projects

GVA will constantly look for beneficial partnership opportunities not only within the tourism industry but also in different business segments (fashion, banking, education, automobile, sports, etc) that will provide Arizona with greater chance to get their brand well exposed and recognized.

○ Targeted Tour Operators , Selected Agents, and OTAs

Tour Operators

ADV Tours
Ambiental
Calcos
Canada
Turismo
CVC
Flot
Fly Tours
Intercontinental
Interpoint

Master Viagens

MGM
MMT Gapnet
Monark
Nascimento
RCA
Soft Travel
TGK
Tourlines
Visual

High End

Agaxtur
Classtour
Designer Tours
Matuete
Paragon
Turismo
Queensberry
Tereza Perez

Romance

Be Happy
Meg Tours
Sonhos a 2

OTAs

Decolar.com
Expedia.com
Submarino.com

PR & COMMUNICATION OVERALL APPROACH

GVA will work on increasing consumer awareness and knowledge about Arizona through a very effective and efficient online presence and continuous and aggressive public relations services. These activities will aim to boost interest in Arizona as a destination of choice. One of GVA's most effective PR and Communication's tools is our database and CRM system. It is not a simple mailing list but a very accurate, updated and well segmented database combined with a customized CRM system that guarantees productivity and effectiveness for every single one of our activities on behalf of our clients.

○ E-newsletters / press releases

GVA will send weekly e-newsletters to our trade (about 5,000 tour operators and travel agents contacts) & media (about 32,649 contacts - including editors, journalists, freelancers and influential bloggers) databases with information/updates on Arizona.

- **Media and editorial content**

GVA will work closely with all major publications/radio/TV channels in Brazil, planning, managing, coordinating and delivering adequate and constant information on Arizona in order to guarantee great coverage/editorials on Arizona through the year.

- **Press briefing**

GVA will plan, manage, coordinate and deliver Arizona Press Briefing events as well as prepare briefs on media issues and/or one-off interviews. These briefings are small press conferences where we announce updates and share more content on Arizona with key trade and consumer publications, usually in our office or in the media partner's office.

- **Niche markets special coverage**

GVA will plan, manage, coordinate and deliver special content to the Brazilian media focused on Arizona and its niche markets in order to increase exposure and business opportunities for Arizona in addition to greatly differentiate our product in this market.

- **Press trips**

GVA/AOT will organize one press trip for selected publications in Brazil (February 14). We will also send top journalists to attend AOT's international press trips in FY14 (two in the fall and one in the spring), one of which will focus on golf (December 13). GVA will negotiate seats with possible airlines partners in order to minimize cost for this activity and increase exposure and ROI.

- **Targeted publications, websites and blogs**

TRADE PUBLICATIONS

Brasilturis Journal - www.brasilturis.com.br - biweekly newspaper / online portal

Mercado e Eventos - www.mercadoeventos.com.br – biweekly newspaper / online portal

Panrotas Editoria Ltda - www.panrotas.com.br – weekly newspaper / online portal

Revista Brasil Travel News - www.brasiltravelnews.com.br monthly magazine / online portal

TV Travel News – www.tvtravelnews.com.br – web channel / online portal

CONSUMER PUBLICATIONS

ABN Agencia Brasileira DE Noticias - www.abnnews.com.br – a Brazilian press agency that writes about several subjects, including travel and tourism. It is distributed to most of the Brazilian media outlets (reference: Brazilian version of Reuters and Associated Press)

Magazines – All travel magazines in Brazil usually have articles about domestic and international destinations. They also provide ideas of itineraries, tips for interesting and exclusive hotels, suggestion for bars and restaurants, and list of attractions to all type of travelers.

- *Viagem & Turismo* - www.abril.com.br (<http://viajeaqu.abril.com.br/vt>) – a monthly publication – the largest consumer travel magazine in Brazil.
- *Viajar pelo Mundo* – <http://revistaviajar.com.br> – a monthly publication suggesting travel tips for all kind of travelers, including low budget ones.
- *Top Destinos* - <http://www.topmagazine.com.br/?c=destinos> – a monthly publication specialized in luxury destinations and high end experiences.
- *Viaje Mais* - <http://www.europenet.com.br> – a monthly publication with two annual issues focused on luxury themes.
- *Go Outside* - <http://gooutside.uol.com.br/> - a monthly publication specialized in sports and adventure which includes destination features.
- *United Magazines Editora* - www.unitedmagazines.com.br – a publishing house responsible for nine magazines. The main one is “Go Where”, a bimonthly magazine that focus on the upper class/high-end consumer segment and tourism.

Newspapers – The list below includes the top Brazilian newspapers. They all have a section for the tourism segment. In the travel section they include information on destinations, different attractions, festivals, flights, shopping and all kinds of curiosities related to tourism. They are all daily publications.

- *Folha de Sao Paulo* – <http://www1.folha.uol.com.br/turismo/> - Nationwide – with a special section focused on the State of Sao Paulo / Online portal.
- *Estado de Sao Paulo* – <http://www.estadao.com.br/> - Nationwide – with a special section focused on the State of Sao Paulo / Online portal.
- *Globo* - www.oglobo.com.br/boa-viagem - Nationwide – with a special section focused on the State of Rio de Janeiro.
- *Globo Online* - www.oglobo.com.br/boa-viagem - Nationwide – with a special section focused on the State of Rio de Janeiro.
- *Hoje Em Dia* – www.hojeemdia.com.br – Publication for the State of Minas Gerais
- *Correio Braziliense* – [http://www.correio braziliense.com.br/turismo/capa turismo/](http://www.correio braziliense.com.br/turismo/capa_turismo/) - Publication for Brasilia

Online

- Global Sports Net - www.globalsportsnet.com.br – website focused on sports, adventure and tourism. They cover destinations, the best itineraries that include adventure and sport activities for each place.
- Mapa-Mundi.com - www.mapa-mundi.com – website focused on luxury- high end experiences for vacations and business travel, targeting a very demanding audience. The readers can find exclusive tips for different categories: airlines, cruises, shopping, business, accommodation, and others.
- Viajar e simples – <http://www.viajaresimples.com.br/> - electronic magazine focused on middle class tourism. They write about Brazilians and worldwide festivals and events, promotions, destinations, and travel news.

Websites

Below are the top Brazilian online news portals with great travel content – including articles on destinations, honeymoons, shopping, gastronomy, tourist attractions and sports, among others.

G1 - www.g1.com.br - Online Portal that is part of Globo TV Group
R7 - www.r7.com.br - Online Portal that is part of Record TV Group
UOL - www.uol.com.br
Terra - www.terra.com.br
Hiperativos - www.hiperativos.com.br

Blogs

Following our online strategy, we will create new, updated, and amazing content on Arizona and its tourism attractions and use very well followed and respected blogs as one of our main channel of online exposure.

Travel Blogs - TOP 15 TRAVEL BLOGS (INDICA Award)

- | | |
|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 1. http://sairdobrasil.com/ | 9. http://gabrielquerviajar.com.br/ |
| 2. http://outrosares.com/ | 10. http://www.dondeandoporai.com.br/ |
| 3. http://jeguiando.com/ | 11. http://www.arquivodeviagens.com/ |
| 4. http://www.matraqueando.com.br/ | 12. http://www.viagempelomundo.com/ |
| 5. http://www.ajanelalaranja.com/ | 13. http://www.bigviagem.com/ |
| 6. http://www.nosnomundo.com.br/ | 14. http://www.turistaprofissional.com/ |
| 7. http://www.rodandopelomundo.com/ | 15. http://www.turistaprofissional.com/ |
| 8. http://www.aprendizdeviajante.com/ | |

Gastronomy Blogs

- Basilico - <http://www.basilico.com.br>
- Gastrolândia - www.gastrolandia.uol.com.br

Blogs Specialized in Wine Study

- Enoeventos - www.enoeventos.com.br
- Olivier Anquier - www.olivieranquier.com.br

Sports Blogs

- Blog do Juca Kfour - blogdojuca.uol.com.br
- Blog do Fernando Meligeni - www.espn.com.br/blogs/fernandomeligeni#1

Xtreme sports Blogs

- TNT Energy Drink - www.tntenergydrink.com.br

SUMMARY OF ACTIVITIES

Activities	Jul/13	Aug/13	Sep/13	Oct/13	Nov/13	Dec/13	Jan/14	Feb/14	Mar/14	Apr/14	May/14	Jun/14
CONTENT/ INFORMATION STRUCTURE												
Develop collateral materials		x	x	x								
Develop Arizona Website in Portuguese		x	x									
Arizona Social Media Efforts			x	x	x	X	x	X	x	x	x	x
TRADE APPROACH												
Sales Calls	x	x	x	x	x	X	x	X	x	x	x	x
Training Seminars	x	x	x	x	x	X	x	X	x	x	x	x
Suggested Trade Shows			x ABAV		x Gramado					x IPW,WTM		
Sales Mission								X				
FAM Tours				X General					X Luxury			
Co-op activities			x	x	x			X	x	x	x	x
Incentives Campaigns				x	x			X	x	x	x	x
Special Projects	x	x	x	x	x	X	x	X	x	x	x	x
PR & COMMUNICATION APPROACH												
Weekly e-newsletters/ press releases	x	x	x	x	x	X	x	X	x	x	x	x
Media and editorial content	x	x	x	x	x	X	x	X	x	x	x	x
Press briefing	x	x	x	x	x	X	x	X	x	x	x	X
Niche markets special coverage	x	x	x	x	x	X	x	X	x	x	x	x
Press trips			X Red, White and Blue			x Golf		x Brazil Only	X NE AZ			

CONCLUSION

This document includes information on the activities GVA believes will bring the best ROI and exposure for Arizona in this market based on the budget available. Our main goals are to increase trade and consumer awareness, increase sales of Arizona packages and receive a great deal of media coverage through the following actions:

1. Work closely with the major tour operators and travel agents in Brazil to ensure an increase in knowledge of Arizona and the demand of and sales to Arizona.
2. Provide them with all the support and necessary training to maximize sales opportunities to the destination.
3. Focus on dramatically increasing the number of Arizona Travel Specialists from Brazil.
4. Work in partnership with specific associations and entities related to the different niche markets identified.
5. Place significant emphasis on increasing the consumer's awareness and knowledge of Arizona through a very effective and efficient online presence (especially social media channels).
6. Social media activities will be one of the main channels we will use to promote Arizona as TOP and desired destination in this market since a great number of Brazilians (35% of the population) are connected to the social network in Brazil. Social media is pursued in this market as an efficient form of communication with effective and relevant content.
7. Very specific, and aggressive, public relations service focusing on the specific niches (adventurous and luxury) and targeted consumers.